

Socioeconomic Survey Guidelines



**Texas Water Development Board
PO Box 13231
Austin, TX 78711**

WRD-285 (Updated: February 2012)

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Texas Water Development Board
Socioeconomic Survey Guidelines

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These guidelines apply to the following Texas Water Development Board (TWDB) programs:

- Clean Water State Revolving Fund (CWSRF)
- Drinking Water State Revolving Fund (DWSRF)
- Economically Distressed Areas Program (EDAP)

Introduction

The TWDB provides funding for the above programs in the form of loan subsidies and grants for projects by communities that qualify as disadvantaged. Qualifying for disadvantaged communities funding varies according to the TWDB program under which the entity is seeking funding. One qualifying requirement common to all TWDB programs offering disadvantaged communities funding is that the entity's service area must have an adjusted annual median household income (AMHI) which is no more than 75% of the adjusted state AMHI¹. Additionally, if an entity is pursuing connection hook-ups under the EDAP program, they must provide family income for each proposed household connection. Please consult the Survey Guidelines for EDAP Connection Assistance (TWDB-0401) for guidance on performing a survey for EDAP Connection Assistance.

Determining Eligibility

In order to ascertain whether an entity meets the AMHI requirement, the TWDB relies on the most recent available American Community Survey (ACS) census data published by the US Census Bureau. The most recent available ACS data must be used to determine the AMHI for the service area of a project that is proposed to be funded by the TWDB. Once the AMHI is determined, it is adjusted to a current dollar value.

In the event that the most recent ACS data for an entity's service area is inadequate or unavailable, the entity may request the use of data obtained from a socioeconomic survey. Documentation to support the entity's conclusion that the most recent ACS data available for its service area is inadequate or unavailable must be submitted for review and approval. **All entities must obtain prior approval from the TWDB to use survey data instead of the most recent available ACS data.** A survey that was conducted prior to TWDB approval may be considered on a case by case basis.

Request to Use Survey Data

A written request to use data obtained from a socioeconomic survey must be submitted to the TWDB and must include:

1. The name and address of the entity;
2. The authorized representative contact information;
3. The consultant(s) representative contact information;
4. A description of the project and any issues or conditions that it is intended to resolve;
5. The name of the TWDB funding program by which the project is proposed to be funded;
6. The approximate number of occupied dwellings in the service area, including any area located outside the current service area to which service is being extended;
7. An explanation of changed conditions not captured by ACS data (e.g., climate, catastrophe, industry, migration, etc.); and

¹ Under the SRF programs, there is an additional requirement related to household cost factors that must be met in order to determine eligibility for disadvantaged communities funding. For more information, see the Disadvantaged Communities Worksheet (SRF-008), which can be found in either the CWSRF or DWSRF Intended Use Plan solicitation packet.

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8. Documentation to support the entity's conclusion that the most recent ACS data for its service area is inadequate or unavailable. This documentation must include:
 - a. A table that identifies all US Census boundaries² that cover the entity's service area, the most recent available ACS data for the AMHI and average household size³ within each boundary, the number of household water and/or sewer connections within each boundary, the percentage of total household water and/or sewer connections within each boundary, calculated proportion of AMHI and average household size within each boundary, and the resulting total AMHI and average household size for all applicable US Census boundaries. See Census Data Search (WRD-284) under Forms for an example table.
 - b. A map showing the boundaries of the entity's service area. This map must also show the locations of household water and/or sewer connections and all US Census boundaries that cover the entity's service area including any area located outside the current service area to which service is being extended.
 - c. A survey that was conducted prior to TWDB approval may be considered on a case-by-case basis.

TWDB Review

Once TWDB staff has determined that the documentation provided by the entity supports the use of socioeconomic survey data instead of the most recent ACS data, the entity will be notified in writing whether or not to proceed with the survey.

Survey Guidance

If the TWDB approves the use of socioeconomic survey data, the following general guidance should be followed.

Independent Surveyor(s)

The survey must be conducted by an independent surveyor(s). An independent surveyor is a surveyor that has no interest, financial or otherwise, in the planning, design, and construction of the project for which disadvantaged communities funding is being sought. A surveyor certification form (WRD-283) that documents the independent status of each surveyor must be submitted with the survey documents (see WRD-283).

It is important to select a surveyor(s) who will hold the attention of respondents, ask the questions as they are written, and accurately record responses.

Defining the Survey Area

The survey must be conducted in a manner wherein the data collected is representative of the entire service area including any area located outside the current service area to which service is being extended. In cases where it is not possible to survey every household, the surveyor should seek to conduct the survey in a manner that allows an adequate sample of the households to complete a survey form.

The following standards relate to the adequate sampling of the area to be surveyed.

1. 50 or Fewer Occupied Dwellings (≤ 50)
All occupied dwellings must be surveyed. A response rate of 75% or greater must be attained from the occupied dwellings.

² Utilize the smallest geographic type (e.g. census tract or block group) for which the most recent census data is available and indicate the year for which the census boundaries were derived.

³ Average household size data is required by entities seeking SRF funding only.

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2. 51 - 100 Occupied Dwellings
A response rate of 60% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.
3. 101 - 200 Occupied Dwellings
A response rate of 50% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.
4. 200 - 300 Occupied Dwellings
A response rate of 35% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.
5. Greater than 300 Occupied Dwellings (>300)
A response rate of 30% must be attained from the occupied dwellings. Additionally, the sample of dwellings must be representative of the entire population of dwellings and household incomes.

The surveyor should ensure that the survey encompasses a cross section of the household population. Essentially, the northern, southern, eastern, western, and central areas of the service area should be represented with completed survey forms. When dealing with small project areas, the survey must encompass a representative cross section of each street, subdivision, and roadside home. A map of the service area, including any area located outside the current service area to which service is being extended, that indicates which households were surveyed must be submitted to the TWDB.

If a contact list of households in the service area is not readily available, the following resources may be useful in identifying all households in the survey area: city indices, reverse directories, telephone books, tax rolls.

Survey Form

A survey form/instrument similar to WRD-273 must be used to obtain the required data for the service area in question. A copy of the completed survey forms must be submitted to the TWDB.

Survey Timeframe

All responses to the survey form must be provided within a ninety-day timeframe.

Survey Method

Listed below are different methods for conducting the survey. All methods should involve identifying the purpose of the survey to each potential respondent, soliciting participation from potential respondents who are qualified to represent the household, and recording responses accurately.

1. Telephone Survey – Be sure to verify the address of the respondent when conducting a survey by telephone.
2. Door-to-Door Survey
3. Mail Survey
4. Combination Survey – This method may be advisable in some situations. For example, when no one is home to answer a door-to-door survey, a note may be left

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requesting that the resident telephone the surveyor. Similarly, the surveyor may telephone a residence to schedule a time to come by to conduct the survey.

Surveyors should attempt to contact residents at a time when they are most likely to obtain a high rate of response and avoid contacting residents during a time that may yield biased results. For example, most people are more likely to be at home early in the evening or on weekends. However, contacting residents only during the day from Monday to Friday may miss families with more than one employed member. Since these families could have higher household incomes than families with only one employed member, contacting residents during this timeframe may lead to the biased result of finding an excessively high proportion of low-income households.

Surveyors should ensure that each survey form is complete and that each response is recorded clearly. Incomplete or ambiguous responses can be clarified by re-contacting the respondent.

Publicizing the Survey

Householders are more likely to respond when surveyed if they are notified in advance of why, when, and how they will be contacted. Different options for publicizing the survey may include letters to residents, local newspaper notices, announcements at church or civic organizations, flyers, and other media. It is appropriate to indicate in the notice that the community intends to apply for funding from the TWDB and that, as part of the application, the community must provide income information from the residents in the service area. It is not appropriate to say that, in order for the community to receive the desired funding, a survey must be conducted to show that most of the residents in the service area have low incomes.

Determining AMHI

Calculation of the AMHI requires the surveyor or entity to arrange the survey results in either ascending or descending order. Thereafter, the surveyor or entity must identify the household income that is in the middle of the range of incomes or calculate the average of the two middle values if there is no one middle number. These calculations must be submitted to the TWDB. An example is presented in the following table:

Incomes in Ascending Order		Incomes in Descending Order	
	\$10,500		\$14,500
	\$11,000		\$14,000
	\$11,500		\$13,500
	\$12,000		\$13,000
AMHI ⇨	\$12,500	AMHI ⇨	\$12,500
	\$13,000		\$12,000
	\$13,500		\$11,500
	\$14,000		\$11,000
	\$14,500		\$10,500

Determining Average Household Size

This data is required by entities seeking SRF funding only. Calculation of the average household size requires the surveyor or entity to list the survey results and divide the sum by the number of responses. These calculations must be submitted to the TWDB.

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Submission of Survey Documents

For entities seeking CWSRF or DWSRF funding, all survey documents must be submitted by the deadline specified in the annual SRF Intended Use Plan solicitation packets. For entities seeking EDAP funding, all survey documents must be submitted by the deadline indicated in the TWDB survey approval letter.

Following is a list of all survey documents that must be submitted to the TWDB:

1. Completed Surveyor Certification form (WRD-283) for each surveyor conducting the survey.
2. Map that identifies the service area, including any area located outside the current service area to which service is being extended, and indicates which households completed surveys.
3. Completed survey forms.
4. AMHI calculations based on the completed survey forms.
5. If seeking SRF funding, submit average household size calculations based on the completed survey forms.

Contact Information

USPS Mail	Texas Water Development Board Program & Policy Development P.O. Box 13231 Austin, TX 78711
Overnight Mail	Texas Water Development Board Program & Policy Development 1700 N. Congress Ave., Rm. 610B Austin, TX 78701
Fax	512-475-2086
Web File Transfer	Register an account at https://www.twdb.state.tx.us/FileTXFR/login.aspx . After files have been uploaded, click on the envelope icon to email a web link/notice to marvin.chaney@twdb.state.tx.us . Note: Pop-ups for this site must be allowed/enabled in order for notice of your file upload to be submitted.

For questions, contact the following TWDB staff:

Marvin Chaney

512-463-8750

marvin.chaney@twdb.state.tx.us

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Glossary

Adjusted Annual Median Household Income (AAMHI) – The annual median household income identified in the most recent American Community Survey multiplied by the current Texas Consumer Price Index (CPI) and divided by the average monthly Texas CPI from the year from which data was provided.

American Community Survey (ACS) – A large, continuous demographic survey conducted by the Census Bureau that provides accurate and up-to-date profiles of America's communities every year. Questionnaires are mailed to a sample of addresses to obtain information about households (i.e. about each person and the housing unit itself). The survey produces annual and multi-year estimates of population and housing characteristics and produces data for small areas, including tracts and population subgroups. Questionnaires are mailed to populations of 65,000 or more for the annual survey, greater than 20,000 for the 3-year survey, and the entire country for the 5-year survey.

Block Group – A statistical subdivision of a census tract. A block group consists of all tabulation blocks whose numbers begin with the same digit in a census tract. For example, for Census 2000, block group 3 within a census tract includes all blocks numbered from 3000 to 3999. Block groups generally contain between 300 and 3,000 people, with an optimum size of 1,500 people.

Census Tract – A small, relatively permanent statistical subdivision of a county or statistically equivalent entity, delineated for data presentation purposes by a local group of census data users or the geographic staff of a regional census center in accordance with US Census Bureau guidelines. Designed to be relatively homogeneous units with respect to population characteristics, economic status, and living conditions at the time they are established, census tracts generally contain between 1,000 and 8,000 people, with an optimum size of 4,000 people. Census tract boundaries are delineated with the intention of being stable over many decades, so they generally follow relatively permanent visible features. However, they may follow governmental unit boundaries and other invisible features in some instances; the boundary of a state or county (or statistically equivalent entity) is always a census tract boundary.

Consumer Price Index – A measure of the average change over time in the prices paid by urban consumers for consumer goods and services, and used as an economic indicator and a means of adjusting dollar values.

Economically Distressed Area – As applied to the EDAP program, an area in which:

- a. water supply or sewer service is inadequate to meet minimal needs of residential users as defined by TWDB rules;
- b. financial resources are inadequate to provide water supply or sewer service that will satisfy those needs; and
- c. an established residential subdivision was located on June 1, 2005, as determined by the TWDB.

Household Income – The sum of money income received in the prior calendar year by all household members 15 years old and over, including household members not related to the householder, people living alone, and other non-family household members. Included in the total are amounts reported separately for wage or salary income; net self-employment income; interests, dividends, or net rental or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

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Forms

These forms are available on the following pages:

- Census Data Search (WRD-284)
- Survey Form for Obtaining Socioeconomic Data (WRD-273)
- Surveyor Certification (WRD-283)
- TWDB Survey Checklist

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Census Data Search

Choose the instructions to follow based on your service area and the funding option desired. Please note that the Census Bureau denotes different time periods for data depending on the last year survey information was gathered (e.g. 5-year data from 2006-2010 will be categorized as 2010 data).

SRF Programs ⁴		
Service Area	Data Year	Instructions
County, City, Town, or Census Designated Place (CDP)	2011	See: Accessing FactFinder 2
Incongruous Census & Service Area Boundaries (e.g. Consolidation projects) Block Groups -> Requires pro rata sheet	2011	See: Accessing Summary Files
EDAP ⁵		
Service Area	Data Year	Instructions
Project within City or Town Limits	2011	See: Accessing FactFinder 2
Project in an Unincorporated Territory Block Groups -> Requires pro rata sheet	2011	See: Accessing Summary File

Accessing FactFinder 2

1. Go to <http://factfinder2.census.gov/>
2. Click "Advanced Search" and then click the "Show Me All" button.
3. Click "Geographies" in the left column
4. Select the "Name" tab and type the name of the location into the search field (e.g. Austin city, Texas). Click the "Go" button to search.
5. From the list of "Geography Results", select the appropriate location. Make sure the Geography Type equals "County" if it is a county or "Place within State" if it is a city, town or CDP.
6. Click the "Add" button to add location(s), then click the "X" in the top right corner to return to the main screen.
7. Type **B19013** into the "Refine your search results:" field then select **Annual Median Household Income**. Click "Go", then check the box and click "View" to view the data.
8. Click "Back to Advanced Search" and click on the white "X" next to the last search (e.g. B19013) in the "Your Selections" section to remove it. Repeat step 7 with **B01003** to view **Total Population** and **B25010** to view **Average Household Size**.

Accessing Summary Files

1. Go to http://www2.census.gov/acs2011_5yr/summaryfile/UserTools/ for 2011 ACS data. Please note that 2012 ACS data, once made available, will supersede the 2011 ACS data.
2. Click to download the "SummaryFileDataRetrievalTool.zip" file and unzip to your computer following all instructions. Note: the application requires Microsoft Excel version 2003 or later.
3. Upon opening the file, remember to click the "Options" button in the "Security Warning" section and enable Macro and Links. Click "Continue" if a pop-up appears.

⁴ All raw data is inflation adjusted to a predetermined period of time prior to solicitation period.

⁵ Only older raw data is inflation adjusted to the most current available ACS time period.

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4. Follow instructions on the screen to start the Data Retrieval Tool.
5. Select "Texas" from the "Select a State" drop-down menu and select the desired data source from the "Data Product" drop-down menu. Please note that the 5-year data source has the most abundant estimates available. Click "Next" to continue.
6. Click the radio button for "Select by Table ID" and in the "Table Name by ID" field, type **B19013** for **Median Household Income in the Past 12 Months**. Check both "Tracts and Block Groups only..." and "Merge Estimates with Margin of Errors..." then click "Next" to continue.
7. The application will display data on the screen as it is being retrieved, which may take several minutes to complete. Click "Ok" on the operation complete pop-up that appears. Depending on your version of Microsoft Excel, find and enable the Filter tool.
8. Under the "Geo Name" column, click the small down arrow icon, hover over "Text Filters", and select "Contains". Type the name of the county in the top blank field and click "Ok". The information is now filtered to Census Tracts and Block Groups within the chosen county.
9. Scroll down the list and retrieve the Median Household Income estimate for each census tract and block group that covers the service area (or project area depending on funding program). To determine the appropriate census tracts and block groups, please follow the steps listed in the *Census Boundary Search* section.
10. Select the "Instructions" worksheet and repeat steps 6-9 for tables **B01003 Total Population** and **B25010 Average Household Size** (retrieve "Total" data).

For block group information, a prorated data table should be used on the data found. The retrieved data must be organized in table format and prorated according to the percentage of household connections. See: Example – Prorated US Census Data.

Example -- Prorated US Census Data

A	B	C	D	E	F	G	H	I	J		
US Census Tract	Block Group	Population	AMHI	Average Household Size	Number of Household Connections	Household Connections as a % of Total Household Connections	Entity's Population (ExF)	Entity's AMHI (DxG)	Entity's Average Household Size (ExG)	County	Source
2523	1	1,279	\$29,712	2.94	30	2.07%	88	\$614	0.06	Travis	2005-2009 ACS
2523	2	5,079	\$60,399	3.5	66	4.55%	231	\$2,745	0.16	Travis	2005-2009 ACS
2524	1	4,683	\$43,149	3.19	1,000	68.87%	3,190	\$29,717	2.2	Travis	2005-2009 ACS
2524	4	1,439	\$45,781	2.96	356	24.52%	1,054	\$11,225	0.73	Travis	2005-2009 ACS
Total					1,452	100.00%	4,563	\$44,301	3.14		

Census Boundary Search

There are two ways of obtaining the census boundaries for a project or service area -- through the US Census Bureau's FactFinder 2 or by utilizing the TWDB's public map shapefiles with ArcGIS software.

Using FactFinder 2

1. Go to <http://factfinder2.census.gov/>
2. Click "Advanced Search" and then click the "Show Me All" button.
3. Click "Geographies" in the left column
4. Click on the "Map" tab at the top of the pop-up screen.

Census Data Search

5. There are multiple sets of census boundaries. The 2000 US Census boundaries were utilized for data gathered beginning with the 2000 Decennial Census and ending with the 2009 ACS. The 2010 US Census boundaries will be utilized for data beginning with the 2010 ACS and ending with the 2019 ACS. Please be aware when utilizing a hybrid of older and newer census data that some boundaries and tract names may have changed.
 - a. For 2010 US Census boundaries:
 - i. Select “Boundaries and Features” on the left of the pop-up screen. This screen will allow you to customize a map depending on census boundaries and major features such as rivers or major highways.
 - ii. Make sure the “Display Boundaries and Features from” field is set to 2010.
 - iii. Checking boxes under “Boundary” will show boundary outlines while checking boxes under “Label” will show labels for selected boundaries. The most useful boundaries for the TWDB’s programs are the 2010 Census Tract, 2010 Block Group, and 2010 Place boundaries.
 - iv. Click “Update” to display the map.
 - v. Click on the State of Texas to activate the map. You may either choose to use the zoom tool to zoom into your project or service area, or you may choose to “Find a Location” by clicking the button located on the left side of the pop-up screen.
 - b. For 2000 US Census boundaries:
 - i. Select “Boundaries and Features” on the left of the pop-up screen. This screen will allow you to customize a map depending on census boundaries and major features such as rivers or major highways.
 - ii. In the “Display Boundaries and Features from” field, select 2000.
 - iii. Checking boxes under “Boundary” will show boundary outlines while checking boxes under “Label” will show labels for selected boundaries. The most useful boundaries for the TWDB’s programs are the 2000 Census Tract, 2000 Block Group, and 2000 Place boundaries.
 - iv. Click “Update” to display the map.
 - v. Click on the State of Texas to activate the map. You may either choose to use the zoom tool to zoom into your project or service area, or you may choose to “Find a Location” by clicking the button located on the left side of the pop-up screen.
6. By utilizing the map feature, you are able to “Select Geographies” using a host of tools (shaded in blue) that will automatically be loaded into “Your Selections” for faster data retrieval. Click the “x” in the top right corner to return to the main screen.

Using TWDB Files

1. For ArcGIS users, go to http://www.tnris.org/get-data?quicktabs_maps_data=1.
2. Download and unzip either “US Census - 2000” or “US Census - 2010” depending on your use of older or more recent census data (located near bottom left corner of screen).

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Survey Form for Obtaining Socioeconomic Data

All fields must be completed and all survey responses must be provided within a ninety-day timeframe.

SURVEY FORM			
Name of City/District/Corporation/Community on Whose Behalf the Survey is Being Conducted			
Date of Response		Surveyor's Name	
1. Respondent's Street Address			
2. Please indicate the combined annual household income¹ for all persons in your household.			
3. Please indicate the total number of people living at this address.			

¹ Household income is the sum of money income received in the prior calendar year by all household members 15 years old and over, including household members not related to the householder, people living alone, and other non-family household members. Included in the total are amounts reported separately for wage or salary income; net self-employment income; interests, dividends, or net rental or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

NOTICE: To knowingly provide false information on this survey is a Class A misdemeanor--Tex. Pen. Code sec. 37.10. The punishment for a Class A misdemeanor is a fine of not more than \$4,000; a jail term of not more than one year; or both--Tex. Pen. Code sec. 12.21.

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Texas Water Development Board
Surveyor Certification

This form must be completed and signed by each surveyor for each project seeking disadvantaged status.

INFORMATION ON ENTITY FOR WHICH THIS SURVEY WAS CONDUCTED	
Name of Entity	
Contact Person	
Title	
Mailing Address	
Phone Number	
Fax Number	
Email Address	

PROPOSED PROJECT FOR WHICH THIS SURVEY WAS CONDUCTED	
Name of Proposed Project	

SURVEYOR CERTIFICATIONS	
1. I do not live within the current or proposed service area of the entity named above.	
2. I have no interest, financial or otherwise, in the planning, design, or construction of the proposed project.	
3. The form used to conduct the survey was based upon the Texas Water Development Board's Form WRD-273.	
4. Information that was used to determine the total number of households in the service area of the proposed project was obtained from:	
5. The number of households that were presented with a survey form is:	
6. The number of households that returned a fully completed survey form is:	
7. The final results and documentation of the survey were compiled by:	
8. The survey form, responses to the survey form, tabulations of the responses, and a map indicating which households were surveyed have been reviewed and to the best of my knowledge and belief are true and correct.	
9. I understand that a false statement on this certification form may be grounds for rejection of the survey results.	

SURVEYOR INFORMATION			
Signature of Surveyor		Date of Signature	
Name of Surveyor			
Residential Address			
Name of Employer			
Title			
Mailing Address			
Phone Number			
Fax Number			
Email Address			

NOTICE: To knowingly provide false information on this survey is a Class A misdemeanor--Tex. Pen. Code sec. 37.10. The punishment for a Class A misdemeanor is a fine of not more than \$4,000; a jail term of not more than one year; or both--Tex. Pen. Code sec. 12.21.

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TWDB Survey Checklist

	Completed
1. Receive letter from the TWDB approving the use of survey data.	
2. Prepare map of the service area and determine which households to survey.	
3. Determine survey method(s).	
4. Prepare survey form.	
5. Publicize information about the survey.	
6. Recruit and train surveyor(s).	
7. Conduct survey.	
8. Check survey forms for completeness and re-contact respondents if necessary.	
9. Document results of survey and calculate AMHI and any other required data.	
10. Submit required survey documents to TWDB.	